

Purpose Worksheet

Client Name: Make Taxes Fair

Date:

Step 1: Watch this Ted Talk

https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action?language=en

Step 2: Brainstorm

Ask yourself or discuss with your team: Aside from commercial intent, why do we do what we do? (this doesn't need to be terribly organized, just get some ideas out onto the table)

We help business owners with the largest unbudgeted expense (their taxes) that drain their budget and create a "mental" tax burden.

Helping people and seeing relief and stress lifted is a joy. We truly enjoy and love what we do to serve people.

Service is at the core of who we are and what we do.

Step 3: Analyze your current services

List the services you are currently offering (or planning to offer), the results these services are bringing for your clients, and why these results are important to your clients/customers...

Service	Result	Benefit/Why
Tax Strategy Roadmap (\$1,500)	Showing the business owner the things that they are MISSING in their business for tax strategy	Clarity and laying out a course of action (either DIY or DWY)
Implementation Custom Pricing based on complexity. \$12,000 - \$50,000+ 3 MONTH ENGAGEMENT	Implementing Tax Strategy on a done for you/done with you model. Full integration into your business of the tax strategies following the CLEAR EDGE Framework.	30-50% average reduction in tax bill with the potential reduction of MORE. But not only tax savings for the first full tax year of strategies being implemented.



	<p>Full execution of the tax strategies taken from the ROADMAP executed with the client over the 3 months engagement (1 quarter)</p>	<p>Our CLEAR EDGE Framework and process gives a busy business owner the tools and method to develop a baseline understanding of the strategies so that they know the WHY of the tax strategy and the financial IMPACT of the tax strategy.</p> <p>We apply what we the FIRE Method:</p> <p>Focus- Learn the basics of the strategy Impact- Understand the financial and operation efficiency that the strategy provides Revisit- The steps needed to be taken Efficiency- Is obtained</p>
<p>ATTACK Mode- Custom pricing \$750-\$3,000 + per month</p> <p>Month to month ongoing engagement</p>	<p>After the foundational implementation phase/mode is completed, now we move into proactive "ATTACK" mode to continuously attack your tax bill.</p> <p>We do this through:</p> <ul style="list-style-type: none">- Prescheduled client meetings for the year- Meetings crafted to follow the CLEAR EDGE Framework agenda for proactively maintaining tax strategies that have	<p>Clients want to engage with Make Taxes Fair on the ATTACK Mode phase because:</p> <ul style="list-style-type: none">- We proactively work with them- We identify tax savings with them- The cost of the tax preparation is INCLUDED in this monthly engagement <p>For every strategy, there are clear and concise NEXT STEPS for every strategy.</p>

	<p>been implemented</p> <ul style="list-style-type: none">- Following the CLEAR EDGE Framework to identify at minimum on a quarterly basis what NEW strategies can be deployed for the business <p>Ongoing education, workshops provided to our communities.</p>	
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THE CLEAR EDGE FRAMEWORK

The CLEAR EDGE Framework is the Make Taxes Fair proprietary framework through which we examine and execute tax strategy and planning for our clients.

The pillars in the CLEAR EDGE Framework are:

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- Credits- Tax credits are often missed and we identify your eligible credits to pay less in taxes
 - Legal structure- Your legal structure impacts your taxes and we help you optimize this pillar
 - Employees- We help you hire, retain, and reward employees in tax efficient ways
 - Accumulation of Wealth- Growing your wealth in a tax optimized way is vital

- Retirement planning- Or what we call “future planning” is also vital for tax efficiency
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- Exit planning- Selling a business and other appreciated assets can be done in tax efficient ways
 - Deduction optimization- We help you find all the missing deductions that you should be taking
 - Getting organized- Organization can bring tax savings and business efficiency
 - Efficiency- Applying the CLEAR EDGE Framework will give you a level of efficiency in your taxes that you have never seen before.
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The CLEAR EDGE Framework is the foundation for how we serve our clients and combined with our Tax Strategy FOCUS System comes together to provide a clear path for our clients to have

Step 4: Discuss Core Beliefs

Finish this sentence: I/We believe that...
Record your responses.

For each belief you identify, ask yourself why that belief is important to you/your organization. When you've come up with an answer, you may have to dig a little deeper by asking 'why?' again and again until you feel you have reached the root of your belief.

Belief	Why
We believe that YOU can do better things with your money than the government can.	<p>Pretty clear statement.</p> <p>It feels like a win every time we help a business owner keep their money.</p> <p>You are your own economy.</p> <p>We want to see you succeed, grow, and do better. Servant's heart.</p>
We believe that you deserve better than a "happy historian" who just files your taxes by putting the right numbers in the right boxes.	You deserve a proactive partner who is looking out for your best interests and who can help you take action to execute tax strategies.
We love our country and the opportunities here. There is a lot of opportunities in our tax code.	Freedom and prosperity and growth are at the foundation of who and what we are as both people and a business.

Our Brand Purpose:

Our purpose is to relieve the financial and emotional burden of taxes on business owners.

We exist to help busy, overwhelmed business owners who have found success in their business and who are feeling the burden (both financially and mentally) of the stress of taxes. Our mission is to help simplify the entire tax system to help a busy business owner not just learn about tax savings strategies but to have clear, concise, actionable and specific next steps that they can take to alleviate the stress of taxes.



Our purpose is to help busy, overwhelmed business owners overcome both the financial and the emotional burden of taxes.

OUR ETHOS: <https://maketaxesfair.com/about-us>

Our Mission

At Make Taxes Fair, our mission is to educate and empower American business owners with the tools and knowledge to legally pay as little tax as possible. In a world gone, “Tax Mad”, we declare freedom from the financial oppression that high taxes have on a business. We aim to provide the American entrepreneur with a simplified and easy-to-execute solution for tax savings. Our mantra is, “Friends don’t let friends overpay the government”, and we take that very seriously.

Our Vision

Our vision is to have our name, MAKE TAXES FAIR, be the battle cry of the American entrepreneur. Where there is complexity in the tax code we will teach simplicity and where there is chaos we will create order. We accomplish this by putting our proven system in place for every business owner to use so they can feel confident and be in control of their finances. Many say the US tax code is broken but we say it’s merely misunderstood and we are changing that perception.